Landscape and Context for Selecting States and Regions

Presented to: Atlantic Philanthropies

OVERVIEW

• Purpose of the project
• Six areas of exploration
• The research process
• Demographic, economic, and political background
• Framing needs and opportunities
• Geographic opportunities
• Investment strategies
• Measuring success
• Key decision points
• Internal processes to support the strategy
• Looking forward
PURPOSE

Using a social movement framework, PERE was charged to explore innovative efforts and promising trends that are bubbling up in localities and states across the US that could be translated into national opportunities.

SIX AREAS OF EXPLORATION

CRITERIA FOR ASSESSING THE STATES

1) Ecosystem of progressive organizations
2) Demographic change of regions and states
3) Political context
4) Ability to leverage change
5) Existing grantee organizations and potential collaboration with other funders
6) Relationship to Atlantic’s four funding areas
THE RESEARCH PROCESS

Our research process combined information provided by Atlantic Philanthropies, interviews, and additional data analysis.

• 25 interviews were conducted with staff and leadership from:
  9 representing foundations (6 plus 3 with Atlantic PO)?? Do we have these numbers right? We interviewed seven people from Atlantic not counting Vivien, Eyal, and Marcia!), 6 representing organizing networks, 6 representing intermediaries supporting organizing, 4 representing organizing federations

THE RESEARCH PROCESS


• We conducted additional demographic analysis to complement Atlantic’s electoral research

• Grounded quantitative data analysis with qualitative examples [to cross-check with political realities]
THE ANALYSIS

POLITICAL

Demographic influences on elections show up more with national than state elections. We need to increase affect in off years.

~Frank Sanchez, Needmor Foundation.

- Voting trends

THE ANALYSIS

- New Organizing Institute Study:
  - Rigorous analysis that considers states that are amenable to progressive change
    - 11 states
    - demographic potential to become more progressive
    - on the “tipping point” politically
THE ANALYSIS

Two minor analytical notes:

Changes in the electorate are largely driven by Latinos and...

- Assume the **voter turnout** by race/age/sex category is the same across states – including for Latinos

- Assume the **democratic vote** by race/age/sex category is the same across states – including for Latinos
Why does it matter?

- Latino voter turnout rates vary significantly by state – mostly due to differences in the percent non-citizen.

- Democratic propensity among Latinos also varies by state – mostly due to origin of Latinos.

**THE ANALYSIS**

**Latino Voter Turnout**

(as a share of the voting-age population)

2000, 2004, 2008 Average

- National Average (29.3%)

- New Mexico: 45.3%
- Florida: 36.4%
- Colorado: 31.6%
- Texas: 28.5%
- Virginia: 27.0%
- Nevada: 25.8%
- Arizona: 25.3%
- Indiana: 20.4%
- Georgia: 16.6%
- North Carolina: 8.8%
THE ANALYSIS

Latino Vote: Voter Turnout by Percentage Non-Citizen
November, 2004

Latino Vote: Voter Turnout by Percentage Non-Citizen
November, 2008

THE ANALYSIS
THE ANALYSIS

Latino Democratic Vote by State
2004 & 2008 Presidential Election Average

77.0%
68.0%
65.0%
64.5%
62.5%
56.5%
56.0%
50.5%
43.0%

INDIANA* NEVADA VIRGINIA* COLORADO NEW MEXICO TEXAS ARIZONA FLORIDA GEORGIA

National Average (60.0%)

* Data is for 2008 only
No data available for New Hampshire or North Carolina

THE ANALYSIS

Latino Voter Turnout and Projected Democratic Gains by State

Democratic Vote  Projected Gains

1.8%
1.6%
1.4%
1.2%
1.0%
0.8%
0.6%
0.4%
0.2%
0.0%

INDIANA* NEVADA VIRGINIA* COLORADO NEW MEXICO TEXAS ARIZONA FLORIDA GEORGIA

0%
10%
20%
30%
40%
50%
60%
70%
80%
90%

* Democratic vote data is for 2008 only
No data democratic vote data available for New Hampshire or North Carolina
THE ANALYSIS

In general:

- Democratic gains for New Mexico are likely to be higher than projected
- Democratic gains for North Carolina and Georgia are likely to be lower than projected
- The biases for Florida and Indiana work in opposite directions – may balance out

THE ANALYSIS

This is electoral strength – and clearly important and extraordinarily well-done to focus on the progressive and not just the Democratic vote

- We add some elements that have to do with movement strength
- These elements might have to do with other elements of demography, the nature of the economy, and the other social actors
THE ANALYSIS

DEMOGRAPHIC

The cadre of Roosevelt Democrats are aging; the next wave of the older population is not as progressive
~Michael Ettinger, Center for American Progress

- Demographic divergence by age
- Immigration by state
- “Ethnic Churning”

THE ANALYSIS

Demographic Divergence by Age
(Difference in % Non-Hispanic White Between the Population Over and Under 65)
2008

National Average (17.2%)
THE ANALYSIS

Demographics and State Capital Spending Adjusted for Income

Places with larger demographic divergence by age have challenges with public narrative and public investment – the old do not seem themselves in the young.

THE ANALYSIS

More recent immigrants mean more new voters coming up the line and also more energy for some movements; see TX, FL, NV, MA, GA.
## THE ANALYSIS

### Ethnic Churning Index

(Absolute Sum of Changes in the Percentage Population by Race)

<table>
<thead>
<tr>
<th>State</th>
<th>2000-2008</th>
</tr>
</thead>
<tbody>
<tr>
<td>NV</td>
<td>19.1%</td>
</tr>
<tr>
<td>NM</td>
<td>14.6%</td>
</tr>
<tr>
<td>CA</td>
<td>13.5%</td>
</tr>
<tr>
<td>FL</td>
<td>12.7%</td>
</tr>
<tr>
<td>TX</td>
<td>11.2%</td>
</tr>
<tr>
<td>GA</td>
<td>10.4%</td>
</tr>
<tr>
<td>MA</td>
<td>9.2%</td>
</tr>
<tr>
<td>IL</td>
<td>9.2%</td>
</tr>
<tr>
<td>VA</td>
<td>8.5%</td>
</tr>
<tr>
<td>CO</td>
<td>8.5%</td>
</tr>
<tr>
<td>NY</td>
<td>7.3%</td>
</tr>
<tr>
<td>MN</td>
<td>7.2%</td>
</tr>
<tr>
<td>NC</td>
<td>7.0%</td>
</tr>
<tr>
<td>TN</td>
<td>5.4%</td>
</tr>
<tr>
<td>WI</td>
<td>5.2%</td>
</tr>
<tr>
<td>MS</td>
<td>4.7%</td>
</tr>
<tr>
<td>OH</td>
<td>4.3%</td>
</tr>
<tr>
<td>MI</td>
<td>4.0%</td>
</tr>
</tbody>
</table>

**National Average (8.8%)**

Ethnic churning – or change – can create challenges but research suggests that it also scrambles traditional coalitions and creates space for new movement activities.

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**THE ANALYSIS**

### ECONOMIC – insert charts and graphs

The south is home to nearly half of the nation’s poor population. It is a region plagued with persistent poverty, home to a majority of hate crimes, and a hotbed of resistance to integration. ~Janine Lee, Southern Partners Fund

- Working poverty measures
- Income distribution
- Economic growth
- Union density
- Health insurance coverage
THE ANALYSIS

Working poverty is a problem but also creates more sympathy for the poor and helps political alliances.

THE ANALYSIS
THE ANALYSIS

Perhaps surprisingly, faster growth creates better conditions for organizing and more interest in equity.
Labor has been an important element of the new social movements, particularly where it reaches to community.
THE ANALYSIS

Union Density (Private Sector)
% of all workers who are union members

Change in the % Union Density, 2000-2008

% Union Density, 2008

National Average

THE ANALYSIS

% Population Without Health Insurance
2008

National Average (15.4%)
THE ANALYSIS

Certain states surface in this empirical movement base analysis as in the electoral analysis

- Next version will detail these and will have a composite measure
- We will also add a count of social movement orgs based on the Ford analysis

FRAMING NEEDS & OPPORTUNITIES

WHAT IS NEEDED FOR SOCIAL MOVEMENT ORGANIZING

• Multi SCOPE
• Multi SCALE
• Multi SKILL

Working cross sector, we know that we can’t win alone. It requires us to sit down with others. We each bring our expertise and don’t have to do everything.

~Juliet Ellis, Urban Habitat Program
FRAMING NEEDS & OPPORTUNITIES

MULTI - SCOPE

Issue-based organizing can be a significant building block or wedge for leveraging broader change. However, it is cross-issue and multi-issue organizing that is the making of social movements.

A universal understanding that the social movement infrastructure is where support is needed. The notion that groups can get their issues addressed alone is not viable.

FRAMING NEEDS & OPPORTUNITIES

MULTI SCALE

Strategies and infrastructures that build up from local, to state, to federal level are needed to support social justice efforts.
**FRAMING NEEDS & OPPORTUNITIES**

**MULTI-SKILL**

Social movements require many skill sets which different partners bring to bear.

Skills can be applied to issues or movement building; however, the approach and outcomes will differ.

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**MULTI-SCOPE**

**ISSUE-BASED ORGANIZING VS SOCIAL MOVEMENT ORGANIZING**

<table>
<thead>
<tr>
<th>Functional Capacity:</th>
<th>Issue Based Organizing:</th>
<th>Social Movement Based Organizing:</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Organizational focus/structure</td>
<td>• A particular sector and links to others</td>
<td>• Multi-issue &amp; participates in</td>
</tr>
<tr>
<td>• Campaigns</td>
<td>• Campaigning for a single issue policy win</td>
<td>state/national networks &amp; across</td>
</tr>
<tr>
<td>• Convening role</td>
<td>• Bringing people in a sector together to exchange best practices</td>
<td>networks</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Coalition building beyond a single campaign</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Bringing people together (the glue) for long-term community building</td>
</tr>
</tbody>
</table>
### FRAMING NEEDS & OPPORTUNITIES

#### MULTI-SCOPE

**ISSUE-BASED ORGANIZING VS SOCIAL MOVEMENT ORGANIZING**

<table>
<thead>
<tr>
<th>Functional Capacity:</th>
<th>Issue Based Organizing:</th>
<th>Social Movement Based Organizing:</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Leadership development</td>
<td>• Building capacity within an organization or community</td>
<td>• Building capacity internally and seeing beyond one’s own organization or constituency</td>
</tr>
<tr>
<td>• Communications</td>
<td>• Get your message across to win a particular struggle</td>
<td>• Need vision, hindered by not knowing what we are for, only what we are against</td>
</tr>
<tr>
<td>• Organizing</td>
<td>• Base building in a neighborhood (and with allies) or around an issue. Communicating complex ideas</td>
<td>• Base building that builds momentum beyond an issue or place. Infuse momentum and set the stage for changing the economic model</td>
</tr>
<tr>
<td></td>
<td>• Sectoral analysis, power analysis</td>
<td>• Broader landscape, ecosystem analysis</td>
</tr>
</tbody>
</table>
MULTI SCALE & MULTI SKILL: STRATEGIES FOR BUILDING UP

The lesson can’t be to birth a statewide thing and lose the local. The statewide crew and locally based people need to be really intentional to keep it based in the local work. We have to keep it grounded. The role of the local work is to hold the statewide work accountable.

~Gihan Perera, Miami Workers Center

FRAMING NEEDS & OPPORTUNITIES

MULTI SCALE: STRATEGIES FOR BUILDING UP

Base Building:

• Local work keeps the states accountable
• A base is essential to moving the state
• Political trust and alignment is the cornerstone to let the other work happen

Need to have real people, trained and in on the strategy and making decisions, who are informed by the research, who are the face of the campaign or you can’t win anything real.

~Madeline Janis, Los Angeles Alliance for a New Economy
Advocacy:

- Combination of c3 and c4 work is needed
- Some see more receptive environments at the states – far more cutting-edge
- Others see that seeing at the local level and “leap frogging” to the federal level holds more promise recently
- Can be helpful to have central capacity for advocacy tools when something is ready

Coalition Building:

- A collective alignment process
- Build up coalitions from local groups to state organizations, and join national networks
Legislative Expertise:

- These are not the best examples
  - Build up local policy wins across the state in order to achieve state change (Ex. Children’s Health Initiative)
  - Building on smaller policy wins make it easier to expand (Ex. Living Wage)
  - Create momentum nationally (Ex. Green Jobs)

Policy Capacity:

- Have inside-outside strategies.
- Appointment to Boards don’t operate on an election cycle, they have continuity.
FRAMING NEEDS & OPPORTUNITIES

MULTI SCALE & MULTI SKILL: STRATEGIES FOR BUILDING UP

Groups want the killer number that will encapsulate what they are going for... like the gun law in CA. ‘There are more licensed gun dealers in the state than McDonalds.’ Everyone relates to that. Crave ways to communicate complex ideas,

~Michael Etlinger, Center for American Progress

Media and Communications:

- Framing to create momentum to affect national debates
- Influencing policy through stories (grounding it in reality)
- Using new media

GEOGRAPHIC OPPORTUNITIES

THREE TYPES OF STATES TO FUND

1) TIPPING [on the brink]
2) ANCHOR [maintenance]
3) LONG-TERM [further out]
GEOGRAPHIC OPPORTUNITIES: TYPES OF STATES

TIPPING

Places with national political salience where there is changing demography and potential for tipping over …
~Deepak Bhargava, Center for Community Change

Tipping states are those on the verge of flipping, recently flipped, and require support to go over the edge and stay there.

GEOGRAPHIC OPPORTUNITIES: TYPES OF STATES

ANCHOR

You can’t neglect the states that look easy because they actually have to be pushing hard in order for the rest of us to have something to aspire to.
~Leslie Moody, Partnership for Working Families

Places that play a bell-weather role, have strong infrastructure in parts of the state, and require support to maintain their position.
GEOGRAPHIC OPPORTUNITIES: TYPES OF STATES

LONG-TERM

Ballot measure work is only one part of an ongoing and sustained civic engagement effort to make significant changes in public policies . . . work in communities of color should not happen only around election time but has to be a long-term strategy to achieve major policy victories. We need to get out of the campaign mentality and adopt a movement building mentality."

~WA State Win/Win Network Director George Cheung on Cross Issue Organizing

Places with rapid demographic change, and an infrastructure that is not necessarily keeping pace, requiring long-term investment with potentially large returns.

GEOGRAPHIC OPPORTUNITIES

STATES FOR CONSIDERATION

??? Placeholder for a map with states highlighted
GEOGRAPHIC OPPORTUNITIES

COMPARED WITH CURRENT AP FUNDING

• States indicated with ** received over 40 grants this year

• States indicated with * received between 20-39 grants this year

• States without any indication received less than 19 or less grants this year

GEOGRAPHIC OPPORTUNITIES

STATES FOR CONSIDERATION

• These are the places showing potential for progressive change in each of the three categories (Tipping, Anchor, and Long-Term)

• States are divided into two tiers, and include a runner-up in each category
GEOGRAPHIC OPPORTUNITIES

FIRST TIER: TIPPING

| NORTH CAROLINA* | There is a palpable sense of movement and entrenchment of the right as well. ~Bill Vandenberg, OSI |
| It is the anomaly of the south. ~Frank Sanchez, Needmore Fund |

| VIRGINIA* | Statewide organization that does grassroots organizing and development, building for a long time without a lot of support. ~Leslie Moody, The Partnership for Working Families |

| COLORADO* | Not a place where you would think of as a progressive hub...It’s the kind of place where institutions could soak up a good amount of an investment and really get to scale. ~Madeline Janis, LAANE |

First tier Tipping runner up: FLORIDA

GEOGRAPHIC OPPORTUNITIES

FIRST TIER: ANCHOR

| CALIFORNIA** | It is ripe for change because things are so bad, the fiscal issues are trickling down....Constituencies believe the state is broken. It creates and environment for new ideas and collaborations. ~Juliet Ellis, UHP |

| ILLINOIS** | IL for Immigrant Refugees ....An example of how you go from local 100 base groups to affect the state and now they are influencing the national debate ~Frank Sanchez, Needmor Fund Central IL Organizing Project is expanding organizing down state—organizing middle America, one of the best kept secrets in organizing. ~George Goehl, National People’s Action. |

| WISCONSIN* | Folks just are not funding where the population is declining even though there’s real needs there...there are a couple of cities where the shift in the industrial economy left them decimated but we have to do something because they are still electoral states. ~Leslie Moody, Partnership for Working Families |

First tier Anchor runner up: MASSACHUSETTS
### GEOGRAPHIC OPPORTUNITIES

#### FIRST TIER: LONG-TERM

<table>
<thead>
<tr>
<th>TEXAS**</th>
<th>If you change five districts, you change the composition of the House. 13 districts are in play – and we only need two (five to be comfortable).  ~Ernie Cortez, IAF</th>
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</thead>
<tbody>
<tr>
<td>GEORGIA</td>
<td>The youth poverty and with older population, there is impetus for change. ~Linda Meric, 9 to 5</td>
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</table>

Labor has also been searching for strategy in the South - they are seeing Atlanta as an entry point for testing their strategies. ~ Anthony Thigpenn, Push Back Network

First tier Long-Term runner up: NEVADA

### GEOGRAPHIC OPPORTUNITIES

#### SECOND TIER: TIPPING

| NEW MEXICO* | • NM swing states and could easily swing back to extreme right wing agenda. ~Leslie Moody  
• It is growing and could contribute to political changes nationally. ~Scott Reed |
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<tbody>
<tr>
<td>OHIO*</td>
<td>• There is state level leadership. Think about infrastructure a little differently. In Cleveland there are changes with the arts, housing, transit oriented. More progressive development. Demand Equity Now (100’s of organizations, a new peer network, broader equity agenda). ~ Judith Bell</td>
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## GEOGRAPHIC OPPORTUNITIES

### SECOND TIER: ANCHOR

<table>
<thead>
<tr>
<th>State</th>
<th>Notes</th>
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<tbody>
<tr>
<td>MINNESOTA*</td>
<td>Minnesota at state level has a good donor base and strong organizations. ~ Bill Vandenberg. There has been a 50% increase in people of color...and has smart and strategic organizing ~ Judith Bell</td>
</tr>
<tr>
<td>MICHIGAN*</td>
<td>Demographic change is an exodus. Losing regional districts—rust belt to the sun belt, leaving with the jobs. ~ Ryan Frederichs, State Voices</td>
</tr>
<tr>
<td>TENNESSEE*</td>
<td>Lots of good organizing, particularly immigrant/African American...groups work well together...Can’t write off this axis - and Tennessee has the best shot. ~ Deepak Bhargava, Center for Community Change</td>
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### SECOND TIER: LONG-TERM

<table>
<thead>
<tr>
<th>State</th>
<th>Notes</th>
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<tbody>
<tr>
<td>MISSISSIPPI</td>
<td>“As the south goes, so goes the nation.” ~ de Bois, referenced by Janine Lee, Southern Partners Fund</td>
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</tbody>
</table>
### GEOGRAPHIC OPPORTUNITIES

#### The States

| North Carolina | • On the tip to redefining the south – undergoing rapid shifts  
| | • Robust grassroots: Blue Print as a convener,  
| | • Some progressive policies: Lots of death penalty work on the Racial Justice Act  
| | • Some funding infrastructure  
| | • Smaller (than African American) but also younger segment of Latinos in North Carolina will help drive progressive growth even further (Oi report)  
| | • Low union density  
| | • Recently turned blue, had Democratic governor  
| | • Anti immigrant scape-goating as immigrants fill jobs |

| Virginia | • Serious money from Democratic Party  
| | • Fast changing and growing  
| | • Decent, emerging capacity: some strong groups–VA Organizing Project. VOICE (IAF), Tenants and Workers United.  
| | • Big regional divisions  
| | • Gaps in inclusivity of base building  
| | • Recently elected a Republican governor in a landslide  
| | • Well-organized on politics but not policy |
## GEOGRAPHIC OPPORTUNITIES

### The States

**Colorado**

- Well funded and with capacity
- Democratic Alliance is strong
- Has anchor organizations: FRESC’
- Piton Foundation, progressive partner
- Labor movement and grassroots organizing

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<tbody>
<tr>
<td><strong>Colorado</strong></td>
<td></td>
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</tbody>
</table>
|   | • Historically independent  
  • Some key areas that are more progressive, surrounded by rural conservatives  
  • ’06 state flipped but with weak leadership |

**Florida**

- New World investment
- Interesting opportunities for ageing
- Rapidly changing demography: growth of non-Cuban Latinos
- Florida has seeds for change
- Politically a key state

<p>| | |</p>
<table>
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</thead>
<tbody>
<tr>
<td><strong>Florida</strong></td>
<td></td>
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</tbody>
</table>
|   | • Not a lot of statewide coordination: Nascent statewide efforts with MWC and FLIC  
  • Take a piece of the state: I-4 corridor used to be heavily Republican now at parity between Rep/Dem/Independent |

*The implications for a state like Florida, certainly no stranger to close elections, are obvious.*

— OI Report
### GEOGRAPHIC OPPORTUNITIES

#### The States

<table>
<thead>
<tr>
<th>State</th>
<th>Opportunities</th>
</tr>
</thead>
</table>
| **California** | • Strong state networks (APOLLO, State Alliance)  
• Strong anchor orgs for national networks (SCOPE, LAANE, Gamaleil, IAF, PICO, Right to the City)  
• Can’t neglect the states that look easy, they are pushing hard and creating models  
• ELEV8 in Oakland  
• Pockets of both progressives and huge conservative forces  
• The coastal strength in CA is not sufficient for state change, need the Central Valley and other regions |
| **Illinois** | • Influx of immigrants  
• Organizing on issues like healthcare, bailouts, can influence national strategies  
• State electeds go the right way  
• ELEV8 in Chicago  
• Small neighborhood groups organizing in Chicago but not tied together  
• Used to be a battleground, now blue. |
### GEOGRAPHIC OPPORTUNITIES

#### The States

| Wisconsin | • Great infrastructure  
|           | • Some funders and in-state donors |
|           | • Pockets of progressives and huge conservative forces  
|           | • Building up base and shoring up the base |

#### GEOGRAPHIC OPPORTUNITIES

When you think of how to build from an anchor organization to developing capacity and networking to exercise power on the state level, Massachusetts is on my list.

~ Anthony Thigpen, Push Back Network

| Massachusetts | • Labor moved trades on immigration  
|               | • State models for the federal level  
|               | • Has a regional equity coalition  
|               | • Neighbor to Neighbor Anchor organization |
|               | • Solidly blue state  
|               | ??? |
### GEOGRAPHIC OPPORTUNITIES

#### The States

| Texas | • Important to figure it out because of the state’s sheer size  
|       | • Lots of money  
|       | • Demographic diversity  
|       | • Accelerate the flip  
|       | • IAF presence in parts of the state  
|       | • A wild card  
|       | • Huge complex metros  
|       | • The capacity side mostly in Austin |

| Georgia | • Influx of immigrants  
|         | • Potential entry point for labor organizing in the south  
|         | • Georgia Stand Up—really strong urban  
|         | • Citizen’s Coalition on Hunger have rallied local leaders.  
|         | • Cluster of well established groups in Atlanta: Project South, Federation of Southern Co-ops, 9 to 5  
|         | • Underfunded, never on the funder short list but seen as having potential  
|         | • Outside Atlanta thin infrastructure |
### GEOGRAPHIC OPPORTUNITIES

#### The States

| New Mexico | • Solid Democratic majority  
• Progress on death penalty  
• Swings back and forth politically  
• NM growing and could contribute to political changes nationally.  
• Anchor orgs in alliance: The Southwest Organizing Project and SAGE council (indigenous organizing)  
• ELEV8 statewide  
• Smaller state  
• Very legislative-oriented  
• Organizations are thin |

| Ohio | • Huge battleground politically, bellweather state  
• Statewide leadership  
• Regional equity network (Demand Equity Now)  
• Gamaleil, IAF, labor presence in a serious way  
• Progressive research institutes: Community Research Partners, Ohio Matters  
• Fund for Our Economic Future  
• Progressive capacity is pretty thin  
• Huge state with separated regions  
• Not so much demographic change |
### GEOGRAPHIC OPPORTUNITIES

#### The States

<table>
<thead>
<tr>
<th>State</th>
<th>Opportunities</th>
</tr>
</thead>
</table>
| Minnesota | • Good donor base  
                   • Smart and strategic organizing, a pioneer that is pointed to  
                   • Best voter turnout in the country |
|          | • Solidly blue state  
                   ??? |

<table>
<thead>
<tr>
<th>State</th>
<th>Opportunities</th>
</tr>
</thead>
</table>
| Michigan | • Exodus of people leaving to the Sun Belt  
                   • Largest and growing concentration of Arab Americans  
                   • Interesting work to link white led state wide progressive to  
                   communities of color  
                   • Union presence |
|          | • Solidly blue state  
                   • Economic down turn hit auto industry hard |
### GEOGRAPHIC OPPORTUNITIES

**The States**

<table>
<thead>
<tr>
<th>State</th>
<th>Issues</th>
</tr>
</thead>
</table>
| Tennessee | • Energy issues from climate side  
|         | • Immigrants rights work                                               |
|         | • Definitely trending red, needs attention                            |

<table>
<thead>
<tr>
<th>State</th>
<th>Issues</th>
</tr>
</thead>
</table>
| Mississippi | • Soon to be majority minority  
|            | • Southern Echo working on redistricting                                |
|         | • High demands, Persistent poverty  
|         | • Infrastructure thin                                                  |
## GEOGRAPHIC OPPORTUNITIES

### The States

<table>
<thead>
<tr>
<th>Nevada</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Strong union presence, Culinary workers (65,000 members)</td>
</tr>
<tr>
<td>• Good state political infrastructure</td>
</tr>
<tr>
<td>• National federations engaging there more</td>
</tr>
<tr>
<td>• PLAN (a statewide progressive group)</td>
</tr>
<tr>
<td>• Growing and could contribute to political changes nationally</td>
</tr>
<tr>
<td>• A thin ecosystem here, including funders</td>
</tr>
<tr>
<td>• Worst hit with foreclosures</td>
</tr>
<tr>
<td>• Big swings politically</td>
</tr>
</tbody>
</table>

### OTHER STATES CONSIDERED

<table>
<thead>
<tr>
<th>AZ*: Changing demographics ???</th>
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<tbody>
<tr>
<td>ME*: Small, good infrastructure, a little could go a long way</td>
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<tr>
<td>IA*: Bell-weather, tradition of progressive infrastructure. Political investment there.</td>
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<tr>
<td>PA**: Bar bell progressive infrastructure (east/west) in the state, Does not play out at state level</td>
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<tr>
<td>IN: First state to go red, strong base, thin infrastructure, national federations there now</td>
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<tr>
<td>WA*: Dynamic leadership by solid orgs, Statewide Poverty Action Network, can test the progressive agenda</td>
</tr>
<tr>
<td>LA: Changed political climate since Katrina, could be on the cusp of change</td>
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</tbody>
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Note: DC*, MD**, NJ*, NY**, OR*Had significant # of grants and did not rise to the states considered.

GA, IN, LA and MS Had fewer grants and rose up to the states considered.
INVESTMENT STRATEGIES

CONSIDERATIONS FOR INVESTMENT

There are some places where a little investment could go a long way (Maine is a common example) and others where infrastructure is more nascent requiring greater resources.

*Don’t get locked into a model of what to invest in. Know that it varies state to state.* ~Michael Ettinger, Center for American Progress

*...the artifice of national politics is that you should go for cheap dates* ~Deepak Bhargava, Center for Community Change

FILLING GAPS

*There have been some changes in the South and there is a lot of potential, but we are not on the funder’s short list.* ~Linda Meric

Example:

In the South there is little investment into rural communities, and especially to social justice groups. A region that has historically been underfunded.
INVESTMENT STRATEGIES

KEEPING AFOAT

Even where there has been significant change there is no such thing as an easy win.

Example: Colorado

In CO 9-5 worked on unemployment for 6 years to improve the system...had made some progress, passed a bill that got vetoed. The stimulus put money on the table to do the right thing, gave us the leverage to improve the standard. In 2009 passed in the legislature finally. That’s key for investment, long term organizing. We knew the issue, had partnership, and could seize the moment... We were ready to hit the ground running.

~Linda Meric, 9 to 5

INVESTMENT STRATEGIES

EXPERIMENTAL

Support one or two experiments that have more limited capacity but with potential to have strategic influence should they succeed.

Example:

Funders that invested in organizations fighting for the first community benefits agreements were taking a risk that has lead to one of the most successful organizing tools for communities.
INVESTMENT STRATEGIES

LONG-TERM

Need a long term investment in building the base, the forces are strong to keep people out of politics. Generation after generation of not being aware.

~Mary Gonzales, Gamaliel

It’s not about quick hit wins, it’s about platform building. It takes some trial and error.

INVESTMENT STRATEGIES

BUILDING A CRITICAL MASS

Fund clusters to build aggregate power

~Frank Sanchez, Needmor Foundation

Support for building broad coalitions with investment in key organizations.

...the whole universe of unaffiliated, local, metro-based community organizations that have also been more about movement building out of necessity; now there's more collaboration happening.

~Anthony Thigpen, Pushback Network
INVESTMENT STRATEGIES

COORDINATING WITH OTHER FUNDERS

Partner with other state or local agencies

INVESTMENT STRATEGIES

SUPPORT ANCHORS

Support an anchor to move statewide momentum
MEASURING SUCCESS

Overarching caveats on social movement measures:

- Policy wins can be a long term objective, need to capture interim measures

- Value the building movement infrastructure, process focused. Don’t get bogged down with number crunching

- Be realistic about measurable outcomes from states. Do not expect individual outcomes in the short term—that will show in the longer term.

MEASURING SUCCESS

LEVEL OF ENGAGEMENT & COLLABORATION

“Solidarity increases social capital rather than depletes it”
~Marshall Ganz

- How engaged and mobilized is the base?
- It’s not just a numbers game. It’s about the level of commitment.
- How deep is the collaboration across groups, within and across networks?
MEASURING SUCCESS

STRATEGIC COMMUNICATIONS

- Is the vision well articulated across organizations, issues, and sectors?
- Does leadership effectively communicate their message?
- How actively are they framing the issues and debate?
- Has a safe space been created for politicians to be creative?

MEASURING SUCCESS

VOICE, POWER, & ACCOUNTABILITY

- Who is at the table?
- More importantly, who is making the decisions?
- How tied are the decision-makers to the base?
- How diverse are the decision-makers?
MEASURING SUCCESS

LEADERSHIP

• How confident is leadership in their ability to scale up?
• How is leadership spending their time (being strategic or putting out fires)?
• How invested are they in having community leaders involved (vs. staff leadership)?
• Are local leaders being prepared to take appointed and elected positions?

MEASURING SUCCESS

CAPTURING INTERIM POLICY MEASURES

• Local wins can be interim platforms for expanding policy changes
• Amassing local wins across the state to get state-level change
• How linked are these interim measures to local, state, and federal efforts?
MEASURING SUCCESS

ACCOUNTABILITY TO THE BASE

• Monitoring and enforcement of wins
• Local voices are included

KEY DECISION POINTS

KEY DECISIONS FOR GUIDING AP’S INVESTMENT STRATEGY

Our frame is creating connections. Issue areas are silos. Funding at the connections is where real people live those lives. A risky strategy, and very intentional.

~Sara Gould, MS Foundation for Women

What approach will you take to incorporate race and gender justice?
Will it be incorporated into grant-making strategies, or will there be a greater emphasis placed on race and gender justice?
KEY DECISION POINTS

KEY DECISIONS FOR GUIDING AP’S INVESTMENT STRATEGY

What will the mix of categories of Tipping, Anchor, and Long-Term grantees be?

This will require a deeper discussion about where the most capacity is needed

KEY DECISION POINTS

KEY DECISIONS FOR GUIDING AP’S INVESTMENT STRATEGY

How will you invest to relate social movements to the program areas and across areas?

- Investing in issue-based, cross-sectoral movement-based, and capacities
- Examples: school to prison pipeline piece; multi-generational, working families, stimulus
KEY DECISION POINTS

KEY DECISIONS FOR GUIDING AP’S INVESTMENT STRATEGY

You can’t imagine getting to scale without labor. In the new places, labor is an equal partner; elsewhere, it’s the most important player. ~ Deepak Bhargava

How do you emphasize the role of labor when it previously has not had a role?

KEY DECISION POINTS

KEY DECISIONS FOR GUIDING AP’S INVESTMENT STRATEGY

From a movement perspective, how much can we really accomplish in 7 years?

What will the legacy of Atlantic Philanthropies be?
INTERNAL PROCESSES TO SUPPORT THE STRATEGY

WHAT IS NEEDED TO SUPPORT THIS STRATEGY?

• Talking across programs and keeping an eye on the big picture
• Finding the intersections of the issues
• Drawing on each other’s expertise
• Continued staff development on social movements [creating shared understanding of what social justice means]

INTERNAL PROCESSES TO SUPPORT THE STRATEGY

WHAT IS NEEDED TO SUPPORT THIS STRATEGY?

• Staffing to support a social movement framework: centralized resources, placement in the states, and partnering with intermediaries
• Just-in-time evaluation capacity
• Flexibility to changes in the states, but also staying the course
• Build on existing authentic collaborations [rather than building new structures]
• Anticipate differences across states and programs
LOOKING FORWARD

QUESTIONS FOR FUTURE RESEARCH

Might be a place to ask questions from the group???

LOOKING FORWARD

NEXT STEPS

• Presenting of the ppt at the foundation

• PPT will be expanded into memo format by the end of the year
LOOKING FORWARD

FINAL THOUGHTS

• The 2008 election brought new hopes for change...we now live in the moment of defining and developing that change.

• It is an opportune time for a proactive progressive movement...seizing the moment, while having the discipline to see long term, is the challenge for strategic investment in the states.